

# Helpful Hints for Telephone Interviews

## Preparation

- ➔ Prepare as much as possible for phone interview prior to calling the customer.
- ➔ Find and review paper case file and KAECSSES case file. Screen print HOSU.
- ➔ Get appropriate screen prints from other systems (i.e. Bendex, SDX, BARI, BASI, SAVE) and review information submitted by customer so that discrepancies can be discussed.
- ➔ Make note of unanswered questions that need clarification.

## Introduction

- ➔ Introduce yourself by using your title and name of your office.
- ➔ Verify that it is the applicant/recipient to whom you are speaking.
- ➔ Establish if the scheduled time is convenient for you to speak with the applicant.
  - If not convenient, set up a convenient date and time allowing for both the client and yourself to review and complete the interview.
- ➔ Explain to applicant the purpose of the call is to:
  - Acknowledge their request for assistance.
  - Clarify their answers on application.
  - Answer questions they have regarding application process.
  - Complete the application.
- ➔ A smile in your voice can help make the telephone interview proceed more smoothly! Use calm, patient tone if the applicant's voice seems anxious.

## Interview

- ➔ Ask for clarification if you do not understand what client is trying to say. Document answers on the application noting "customer statement". (Suggestion: use different color of ink.)
- ➔ Ask open-ended questions and avoid leading questions. Do not ask, "Has your rent changed?" Instead say, "How much is your rent?"
- ➔ Keep the applicant focused by anticipating and blocking interruptions.
- ➔ Restate what caller has said to make sure the information you are hearing is correct.
- ➔ Offer any useful information that you feel is relevant to the telephone interview.
- ➔ If telephone interview requires an additional follow-up call, ask when is the best time to reach the applicant.
- ➔ Document date of completed phone interview in the log.
- ➔ Document unsuccessful attempts to reach the customer/complete the interview.

## Summary

- ➔ Make sure that if an applicant has questions you will give them an answer.
- ➔ Schedule a follow up contact call if needed.
- ➔ Summarize steps or follow up verifications that are necessary. Explain alternate verifications that are acceptable.
- ➔ Be clear on appropriate time frames, such as when verifications are due. Follow up with a request in writing.
- ➔ Provide your telephone number and best time to reach you.
- ➔ Tell the client that you will assist if they have difficulty obtaining verifications.
- ➔ Thank the client for their time and reassure them that you will do your best to help them. Re-read the penalty of perjury wording and ask if they understand.